

***Department of Social Services
Office of Family Support***

Request for Proposals

**TANF Funds
for**

Individual Development Account

June 2006 through June 2007

***Closing Date: May 24, 2006**

An original proposal must be, and five copies should be, received by 4:30 p.m. on May 24, 2006 by Victoria M. Cooper, Director of Special Services, Department of Social Services, Office of Family Support, 755 N. Third Street, Suite 323 Baton Rouge, LA 70802

**Department of Social Services
Office of Family Support**

755 N. Third Street
Baton Rouge, LA 70804
<http://www.dss.state.la.us/>



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KATHLEEN BABINEAUX BLANCO
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ANN SILVERBERG WILLIAMSON
SECRETARY

NOTICE TO PROPOSERS

The Louisiana Department of Social Services, Office of Family Support, hereby solicits proposals from qualified entities to provide asset and savings opportunities for low-income families for the purchase of a home and financial management education.

Request for proposals may be obtained by contacting: **Victoria M. Cooper, Director of Special Services, Office of Family Support, 755 Third Street, Suite 323, Baton Rouge, LA 70802, Telephone (225) 342-4953; Fax (225) 219-9399; E-mail vcooper@dss.state.la.us or by-downloading the Request for Proposal packet from the DSS Website at <http://www.dss.state.la.us/> (Select Request for Proposals)**

Completed proposals, including one original, must be physically in the possession of the **Office of Family Support, Director of Special Services, ATTN: Victoria M. Cooper, 755 Third Street Suite 323, Baton Rouge, LA 70802 by 4:30 p.m. on May 24, 2006.** Five copies should also be submitted. No proposals received after the specified date and time shall be considered.

Any questions concerning the RFP must be made in writing and may be submitted by mail, fax, or email to Victoria M. Cooper (address shown above) by 4:30 p.m. on **May 12, 2006.** All questions will be responded to on the website at <http://www.dss.state.la.us/> by May 17, 2006. A **non-mandatory** Proposer's Conference will be held on Monday, May 8, 2006 from 10:00 a.m. until 11:30 a.m. at the following location: 8549 United Plaza Blvd, Baton Rouge, LA 70809

This announcement does not commit the Department of Social Services/Office of Family Support to award a contract or pay any costs incurred in the preparation of proposals. It is neither a contract nor an offer to contract, but rather a solicitation of proposals which, if accepted by the Department and approved in the manner required by law, may become the basis for a future contract. In the event of a conflict between any term or provision of the RFP and a term or provision in any proposal submitted in response, this RFP shall control. If a proposal alters or modifies any term or provision of this RFP, such changes must be clearly delineated and expressly approved by the Department of Social Services in writing before a contract is issued. A failure to comply with the provisions of this part shall render any such variant term absolutely null.

The Department of Social Services reserves the right to accept or reject, in whole or in part, all proposals submitted and/or to cancel this announcement. A contract shall be awarded, if at all, to the proposal(s) deemed by the Department in its sole discretion to be the most advantageous to the Department and its clients based on quality of service, cost effectiveness and other considered factors. Any contract is subject to the availability of funds. No contract is final or enforceable until approved by the Department of Social Services and the Division of Administration, Office of Contractual Review. Should any protest or appeal be filed at any point in the procurement process, all activities must cease until all issues are resolved.

Ann Silverberg Williamson
Secretary
Department of Social Services

VISIT OUR WEBSITE @ <http://www.dss.state.la.us>
"AN EQUAL OPPORTUNITY EMPLOYER"

SCHEDULE OF EVENTS

This Request for Proposals package contains all of the information and forms necessary to complete and submit a proposal to provide communities with funding opportunities through TANF to develop innovative, strategic programming solutions suited to the unique needs of Louisiana's families. Proposers are encouraged to review the package in detail prior to beginning to prepare the proposal.

Activity	Date
1. Requests for Proposals	April 25, 2006
2. Proposers Conference	May 8, 2006
3. Deadline to Receive Questions	May 12, 2006
4. Questions/Answers Posted on Website.....	May 17, 2006
5. Proposal Due Date	May 24, 2006
6. Proposal Review Committee Meets.....	June 2, 2006
7. Approved Recommendations Submitted to the Secretary	June 9, 2006
8. Successful/Unsuccessful Candidates Notified.....	June 16, 2006

The Louisiana Department of Social Services/Office of Family Support reserves the right to deviate from this schedule.

1.0 Overview of Individual Development Account Initiative

The Louisiana Department of Social Services/ Office of Family Support is soliciting proposals from qualified non-profit organizations or state or local governments who work with a qualified non-profit organization to develop and administer an Individual Development Account (IDA) for low-income families. An IDA is a financial account established by or on behalf of an individual eligible for assistance for the purpose of enabling the individual to accumulate funds for first-time home purchases. Funds deposited into these accounts will then be matched with Temporary Assistance for Needy Families (TANF) funds.

The TANF funds available for this initiative will address the following TANF goal:

- To provide assistance to needy families so that children may be cared for in their own homes or in home of qualified relatives.

The contract will fund the costs associated with operating an Individual Development Account program by providing a reimbursement each month of the approved expenditures based on a cost reimbursement contract. Funding for this initiative is provided by Federal funds under the Temporary Assistance for Needy Families. Successful proposers may be required to travel to Baton Rouge, Louisiana for negotiation of contract.

All proposals will become public record once the evaluations are completed and an award is made. Any technical data, financial information, overhead rates, or trade secrets protected from disclosure under LA R.S. 39:1490 and LAC 34:V:130, and designated as such in the proposal, shall be kept confidential as required by law. Materials submitted with the proposals become the property of Office of Family Support. The Office of Family Support has the right to use any or all ideas presented in any proposal. Selection or rejection of a proposal does not affect this right.

DSS will not furnish resources or materials to contractors, either during the initial stages or during contract performance itself, except as expressly provided herein.

A non-mandatory proposer's conference is scheduled on Monday, May 8, 2006 from 10:00 a.m. until 11:30 a.m. at the following location: 8549 United Plaza Blvd, Baton Rouge, LA 70809.

2.0 General Information and Program Guidance

2.1 Purpose of the RFP

The purpose of the Individual Development Account Initiative is to assist low-income families with developing saving accounts for specific purposes by matching earnings deposited into accounts with available TANF funds. IDA participants will be educated about financial management, asset development and other financial literacy training regarding financial responsibility and saving strategies. Programs solicited under this Initiative should address the TANF goal to provide assistance to needy families.

The Louisiana Department of Social Services/ Office of Family Support is soliciting proposals from qualified non-profit organizations or state or local governments who work with a qualified non-profit organization to develop and administer an Individual Development Account (IDA) for low-income families. The IDA program shall provide asset and savings opportunities for these low-income families for the first-time purchase of a home as well as financial management education.

2.2 Eligible Proposers

Those eligible to apply are local or statewide public or quasi-public agencies, non-profit (meeting the requirements of non-profit status as determined by the IRS) and for-profit organizations. This initiative will allow organizations/agencies an opportunity to develop innovative and strategic programming solutions suited to the unique needs of Louisiana's communities on a **statewide approach**. Non-profits must be a 501(c) organization and must operate according to bylaws that define its operations and mission. Copies of the IRS determination of 501(c) status and bylaws should be included in the offer.

Selected proposer shall enter into a formal agreement and partnership, no later than thirty (30) days after meeting with a financial institution incorporated in the state of Louisiana, such as a bank, credit union, or savings and loan institution. The agreement shall provide for a safe and secure investment mechanism for IDAs and specify the responsibilities and services for which each party will be responsible in operation of the IDAs. The agreement shall include arrangements regarding deposits and withdrawal, accounts, record-keeping, reporting, and monitoring requirements.

In accordance with the Louisiana Administrative Code at Title 34, Part V, §136 to make a determination of responsibility with respect to each proposer, the selected proposer must meet the following standards as they relate to this procurement.

- Have adequate financial resources for performance, or has the ability to obtain such resources as required during performance;
- Have the necessary experience, organizations, technical qualifications, skills, and facilities, or has the ability to obtain them (including probable subcontractor arrangements); if a proposer intends to use a subcontractor to meet this requirement then the proposer should produce a letter from the probable subcontractor stating that they are willing to provide the required services contingent upon a contract award.

- Be able to comply with the proposed or required time of delivery or performance schedule;
- Have a satisfactory record of integrity, judgment and performance (contractors who are seriously delinquent in current contract performance, considering the number of contracts and the extent of delinquencies of each, shall in the absence of evidence to the contrary or evidence of compelling circumstance, be presumed to be unable to fulfill the requirement);
- Be otherwise qualified and eligible to receive an award under applicable laws and regulations.

Organizations, which are barred from receiving state or federal funds, may not participate in this initiative, directly or indirectly, nor may a proposing organization utilize such ineligible organization in providing services under any contract awarded as a result of this RFP.

2.3 Required/Allowed Program Activities

The selected contractor will be required to plan, develop, and implement a statewide IDA program. Such program shall assist low-income families with developing savings accounts for specific purposes by matching earnings deposits into accounts with available TANF funds. Additionally, contractor shall develop a process to require participation in financial management education, asset development, or other financial literacy training designed to educate individuals about financial responsibility and savings strategies. The program shall be designed in accordance with Louisiana Statutes that guide IDAs: R.S. 46:460.6, 42 USC §604(h), and 45 CFR §263.20 through 263.23.

These IDAs shall be used for the purchase of a home for a first-time home buyer. A plan shall be provided by the proposer that outlines the method for determining when a participant's request for withdrawal and matching funds meets the criteria for a qualified purpose per Louisiana Statutes that guide IDAs as referenced in the above paragraph and the contract.

Proposers shall detail their plan to collaborate with existing IDA programs if applicable, and other community organizations that traditionally serve or have contact with low-income families. Proposers are encouraged to build collaborations with community development corporations, community based organizations, the workforce development organizations or other public agencies to promote asset accumulation.

The proposer should state the goals and objectives of the proposed service(s), identify a minimum number of individuals to serve, provide a process of outreach/recruitment including working with community-based organizations, a strategy for marketing the program, a way to verify eligibility, a system to document and track progress towards meeting program goals and objectives, and a precise statement of what the State will receive as an end-product of the services. This entity should also describe a process to determine potential subcontractors and determine their capacity and experience with providing state services. The proposer should also indicate the method used to determine that subcontractors are not supplanting existing funding sources for identical services.

The selected proposer is **required** to recognize the funding agency (DSS) on all outreach material. Any media releases must be coordinated with the DSS Press Secretary. The selected proposer shall have the DSS logo on all media and published materials including but not limited to brochures, posters and training booklets that are purchased with Agency funds.

2.4 Performance Indicators

Proposals should include year-end program participation targets for this service delivery program. This year-end target should be a projection of monthly targets to demonstrate how the year-end goal will be met. If 80% of the monthly target for program participation as set in the contract is not achieved, a performance enhancement plan will be required. If the performance enhancement plan is inadequate, the contractor is unresponsive, or if performance does not improve after performance enhancement plan implementation, contract termination will be considered.

Monthly performance measures (outcomes) shall be projected for this initiative. Proposers should include a monitoring and evaluation plan for certifying the project outcomes. While the development of a consistent savings habit and an asset purchase are clearly the most important indicators of success, there are several value-added outcomes that have a positive effect on clients' knowledge, skills, and attitudes regarding money and asset building. Examples of such outcomes are as follows:

- Development of a sound financial management plan for participants
- Consistent money management skills illustrated through timely, regular payment of bills
- Increased knowledge of credit management skills
- An established relationship with a mainstream financial institution.

2.5 Reporting Requirement

The selected proposer will be required to report monthly performance data to the DSS TANF Tracking Database reporting system

2.6 Monitoring/Evaluation of TANF Services

All contracts awarded through this RFP must grant to the State of Louisiana, through the Department of Social Services, the Office of the Legislative Auditor, Inspector General's Office, Federal Government and/or other such officially designated body the right to inspect and review all books and records pertaining to services rendered under the contract. The contractor must cooperate with any monitoring/evaluation site visits or requests for information from the above-mentioned entities.

2.7 Type/Period of Contract

Funding for this initiative is provided by Federal funds under the Temporary Assistance for Needy Families Fund. Under no circumstances will the contractor be reimbursed in excess of the amount specified in the proposal. Services proposed should be performed unless excused in writing by the Department. Any cost overruns are solely at the expense of the contractor. The contract term extends from June 1, 2006 until June 30, 2007. At the end of the contract term, the Office of Family Support reserves the right to renew the contract for up to an additional 23 months, if funding is available and performance is acceptable based on reasonable and ongoing progress and satisfactory management of the project.

After an entity has been notified of its selection to receive a contract, the entity shall enter into a performance-based contract with DSS for the services outlined in the proposal and will provide funding to subcontractors who will perform the service delivery. The Contractor will receive payment for services rendered according to the submitted budget.

2.8 Billing

Invoices will be paid on a cost reimbursement basis with the submittal of verification and documentation mandated by the Department of Social Services and State and Federal regulations. Billing for expenses must conform to practices and procedures set forth in the Social Services Procurement Code.

3.0 Ownership of Equipment and Materials

All equipment and materials (including, but not limited to, computers, printers, copiers, facsimile machines, telephones, file cabinets, office furniture, unused office supplies, etc) purchased with funds awarded under this contract may upon completion or termination of the contract become the property of the State of Louisiana and be delivered upon demand to the State or its designee in the manner the State directs. All records, reports, files, data, software and any other materials or information related to this contract or purchased with funds awarded under it may upon completion or termination of the contract become the property of the State of Louisiana and be delivered upon demand to the State or its designee in the manner in which such reports, files, etc., are kept in the ordinary course of business.

4.0 Narrative

The following sections are desired elements of the proposal. Proposals that do not contain these elements may not be considered. Applicants need to respond in clear writing to the following sections, or criteria, reviewing these directions carefully and the points affixed to each scoring element.

4.1 Abstract

Give an overview or summary of your proposal, a maximum of one page that tells who you are, how many you will serve, amount of funds you are requesting and how you will measure outcomes.

4.2 Proposed Narrative

A. Program Description

Proposed plan should include a detailed description of the following three (3) components:

- 1. Administration** – Description of plan to administer a statewide IDA program for low-income families. This plan should include:
 - Recruitment and enrollment procedures designed to attract low income families at or

- below 200% of the federal poverty level
- Establishing participation requirements
- Plan for determining and certifying eligibility
- Plan for targeted number of families to be served
- Detailed action plan to provide credit counseling, home ownership, and financial literacy as appropriate to ensure that all participants have access to these services
- Performance of on-going case management to ensure that clients are meeting savings and asset development goals
- Development of agreement with financial institutions(s) who will have responsibility for keeping insured IDA accounts
- Plan for dissolution of program upon contract termination to include dissemination of all (individual and/or matching contributions) unspent funds.

2. Participation Match – Proposers should describe program guidelines for participants that allow for matching amounts up to a 4 to 1 ratio for each family for qualified purposes up to \$6000 in total contributions made by individual. All matching contributions must be deposited in a separate matching fund account.

This plan should include:

- Budget detail on how many families could be served based on matching ratios
- Timeline for receiving deposits into accounts and making matching contributions
- Process to verify that only earned income is matched using TANF funds or contributions by qualified entities
- Process to limit account activity to 15 months or less
- Ability for deposits to be made to the individual development accounts by the individual account holder
- Process for withdrawal activity for qualified purpose
- Process for releasing total IDA funds to third party recipient on behalf of individual for stated purpose
- Process for insuring that withdrawals meet federal and state TANF guidelines

3. Financial Literacy – The foundation for a sound approach to assets accumulation is the inclusion of a comprehensive financial literacy and awareness initiative in assets accumulation and retention. The proposer's plan should include an outline to aggressively engage potential participants in learning the value and benefits of savings.

Financial literacy courses should include an outline to aggressively engage potential clients in learning the value and benefits of savings. Financial literacy courses should include at a minimum:

- General financial education
- Asset-specific education, such as home ownership, credit repair

Provide as appropriate, the following training classes at a minimum quarterly: economic literacy, and home ownership. Classes shall be strategically placed throughout Louisiana, to enable all

participants to be able to travel to designated areas. Individual plans for each participant in the IDA program will be developed within 30 days of participants' referral to the program.

The proposal should contain information that will convince readers of your capacity to plan and implement a sound program within the contract timeframe. Tell us about your organization's experience (both in service delivery and in working with low-income populations) in this area within the past three years. If you have had a previous TANF funded contract, you should give an overview of the results. DSS/OFS is requesting the name and contact information for two references who can attest to your ability to perform the services outlined in the **RFP (excluding DSS personnel)**. Give specific examples of how you have performed similar services, etc. What impact and outcomes have you documented? How will you be able to document your success? Describe your facilities, equipment, community partnerships or other relevant information.

B. Proposer Qualification

Provide a narrative description of the qualifications and recent experience with conducting an IDA program or similar program with low-income populations. Proposers should demonstrate an understanding of TANF goals and guidelines, particularly as they relate to IDAs. Proposers should demonstrate connection to community resources serving low-income populations across the state. Proposers should have established business or collaborative relationships with banking and financial institutions.

The organization must have systems of accountability to the community it serves, including a community-based Board of Directors. The names, affiliations, addresses and telephone numbers of Directors should be included in the proposal. Any potential conflicts of roles or responsibilities with other organizations or projects should be resolved. The organization must be free of conflicts of interest. The proposer should be able to demonstrate that the information has been disseminated fairly and impartially. Governmental entities are exempted from including Board of Directors information in the proposal.

The selected contractor should have sound business management capability. It must also have adequate liability insurance and adopt referral procedures that limit liability risks. The Office of Risk Management recommends a minimum of \$1,000,000 in coverage.

C. Collaboration Details

Describe the relationship of the proposer's organization to the community at large. Describe the proposer's ability to form successful partnerships with all agencies, organizations and personnel, including plans for public-private partnership in accomplishing the goals of this RFP.

5.0 Proposal Evaluation Criteria

5.1 Review Process

All proposals will be reviewed and evaluated by a committee consisting of Department of Social Services personnel and other qualified professionals. The committee will recommend

for selection the proposal which receives the highest number of points based upon the evaluation criteria below and which most closely meet(s) the requirement of the RFP and the needs and expectations of the Department of Social Services. The final decision will be made by the Assistant Secretary, Office of Family Support, with concurrence of the Secretary of the Department of Social Services. The State reserves the right to award without discussion based on initial proposals received.

5.2 Criteria for Selection

With a 100 point scale, each proposer will be graded on demonstrated ability regarding:

- A. Methodology and Quality of Program Design
- B. Experience and Capability of Organization
- C. Cost Effectiveness
- D. Personnel

5.3 Methodology and Quality of Program Design (40 Points):

Address the required components of the RFP. Detail how the project will be accomplished, including schedules, data collection and analysis, deliverables, quality assurance, reporting, and use of key personnel. Indicates ability to produce measurable gains toward meeting goals using a service delivery accountability system that is outcome driven; clarity to which project objectives are defined, measurable and relevant to goals; extent to which programming is based on IDA best practices for statewide programs. Clarity and rationale with which both problem and solution are defined. Detail coordination of a statewide service delivery program using entities tied to a central association or regulatory body.

Describe how the use of qualified subcontractors with documented experience of working with and/or serving the TANF population on an ongoing basis as well as case management will be determined and used to meet the stated goals, objectives and requirements of proposed services delivery. Details how the project will ensure subcontractors are providing new and expanded services rather than supplanting existing funds. Describe linkages or partnerships that will help you to accomplish your service goals. Describe the three primary components: Administration, Participation Match and Financial Literacy.

5.4 Experience and Capability of Organization (35 Points):

List all recent and similar projects, including references with names and telephone numbers of contact persons (excluding all DSS personnel). Professional qualifications of the organization and its staff in addition to previous experience with administering similar programming. Demonstrated ability to coordinate and to establish multi-community collaborative partnerships with agencies and organizations. Demonstrated experience providing services to low-income populations. Plan for monitoring progress and providing technical assistance to partner organizations. Evidence of financial capability to undertake this contract. Demonstrated business or collaborative relationships with banking and financial institutions.

5.5 Cost Effectiveness (15 Points):

Itemized budget, budget narrative and cost allocation plan, if applicable, detailing proposed cost components; extent to which cost is proportional to established need and client service; financial stability without regard to TANF funding; adhere to the attached guidelines on expenditures and administrative costs.

5.6 Personnel (10 Points):

Demonstrated ability to attract and retain excellent staff with a background appropriate to the services offered. A local project director must be appointed by the Contractor for each proposed project, and a full resume', detailing the director's qualifications and experience, should be included in the proposal. Neither the proposer's project director nor any of the proposer's key personnel may be removed or replaced without written permission of the Agency. Provide complete resumes of key personnel as well as program staff for the delivery of services (If staff have are not currently employed with your organization, provided detailed job descriptions for the positions.).

6.0 Instructions for Completing the Budget and Billing Method

6.1 The Budget and Budget Narrative

The budget must be completed using the attached budget form. Budget items should be itemized according to administrative and direct costs. Categories are listed below. Also, please be sure to report the expenditure appropriate column (i.e. Program Operation vs. Administration Cost). The grand total must reflect the total budget requested. **The Budget Narrative should be completed on a separate sheet of paper titled "Budget Narrative".** Please note the 10% cap on administrative cost. The Budget Narrative should detail all Budget Line Items under each Expenditure Category. For example, the Salaries Category should outline each salaried position including title and monthly or hourly salary.

Provide the description of the expenditure that corresponds to the class of expenditure: for example, salaries, benefits, and supplies.

Salaries - On the Budget Detail Form, give the detail of how the total amount of salaries, wages, participant incentive payments, sabbaticals, etc., to be paid to program personnel.

Give length of employment, number of months (weeks, hours) to be paid, and amount per month (week, hour). For new positions, list the names and/or titles of employees; give a brief job description of each. (Salaries should be in line with those in similar positions within the community). Be sure to only include the salaries as they relate to the proposed service (an executive director may also have responsibilities in other program areas, only the time spent on proposed service is allowable). Please indicate administrative or direct nature of salary.

NOTE: Salary and Employee Benefits for direct service delivery staff should be shown in the Direct Amount Column and do not apply to the 10% administrative cap.

Employee Benefits – Show the total amount of appropriate employee benefits for program personnel.

Purchased Professional and Technical Services - Provide a breakdown of services to be rendered, all related expenses covered by the contract, the number of days or hours, and the rate per hour or day. Includes, banking services, data processing.

Purchased Property Services - Show rentals, repairs, lease and maintenance.

Other Purchased Services – Items such as postage, telephone, printing, transportation, field trips, lodging, etc.

Supplies – Instructional materials, other materials related to program service

Other – Expenditure items that do not apply to the above mentioned

6.2 Billing Methods

All services must be billed as cost reimbursement. Contractors will receive payment for services rendered according to the submitted budget.

- **Programmatic functions include:**

Direct costs associated with providing services such as assessment, case management, evaluation and audit service functions, salaries and indirect costs associated with performing service functions, supplies, equipment, and travel related to the performing of service functions, technology/management information systems not related to administrative functions

- **Administrative functions:**

Administration and coordination of program, salaries and indirect cost associated with performing administrative functions, program monitoring, activities related to eligibility determination, supplies, equipment, and travel related to the administration of the program.

All travel expenses must be in accordance with the Louisiana State Travel Regulations, which can be found at: <http://www.doa.Louisiana.gov/osptravel/traveloffice.htm>.

- **Non-Allowable Expenses:**

TANF funds may not be utilized for the following purposes:

- Purchase of vehicles

- Renovation, construction, or purchase of building used for program operation

- Payment of bad debts or interest payments as a result of credit arrangements

- Medical services

- Purchase of alcohol

- Payment of stipends to program participants without prior authorization from DSS.

- Services or material deemed inappropriate in relation to service delivery

Application Checklist

Individual Development Account

Hand deliver or mail to be received by 4:30 p.m. on May 24, 2006 to:

*Department of Social Services
Office of Family Support
Victoria M. Cooper
755 N. Third Street, Suite 323
Baton Rouge LA 70802*

***NO FAXED COPIES WILL BE ACCEPTED
ALL SIGNATURES MUST BE ORIGINAL***

<p>CHECKLIST OF REQUIRED SECTIONS Without the following, your proposal may not be considered for funding.</p>
--

PLEASE INCLUDE CHECK LIST WITH YOUR PROPOSAL THAT INDICATES YOU
HAVE INCLUDED ALL ELEMENTS

☐ Original and 5 copies (including completed set of attachments)

**PROPOSERS SHOULD ASSEMBLE THE PROPOSALS IN THE FOLLOWING
ORDER:**

- ☐ Signed Cover Page (See attached form page 16)
- ☐ Table of Contents (Proposal should be page numbered)
- ☐ 1-page Abstract (includes projects' intent and methodology outline)
 - o Narrative section (The Narrative section should follow the order as listed in Section 4.0 - Narrative)
- ☐ Budget Summary Form (See attached form page 18)
- ☐ Budget Narrative (Should be completed on a blank page titled "Budget Narrative.")
- ☐ Signed Board Resolution for State Contract Providers
- ☐ Resumes and position descriptions for staff
- ☐ Copy of most recent audit (If your organization is not required to submit an audit, or your agency has not performed an audit, please submit an explanation to this effect.)
- ☐ Financial statement (Financial statement should be clearly labeled and should cover the latest annual fiscal year of the proposer (organization) or the latest 12 month period.)
- ☐ IRS 501 © status (See page 6, Section 2.2 – Eligible Proposers)
- ☐ Two references and contact information (excluding DSS Personnel) (See page 11, Section 4.2 A Program Description)

A non-mandatory proposer's conference is scheduled for Monday, May 8, 2006 from 10:00 a.m. until 11:30 a.m. at the following location: 8549 United Plaza Blvd, Baton Rouge, La 70809.

Proposal Cover PagePLEASE DO NOT WRITE IN THIS
SECTION.

Name of Applicant Organization

Federal ID Number

Program Name

Applicant's Mailing Address:

City

State

Zip

Name of Program Director

Telephone No.

Fax No.

Email address

TYPE OF AGENCY☐ Public Non-Profit Community-Based
Organization☐ Private Non-Profit Community-Based
Organization☐ Faith-Based Organization☐ Public Agency☐ Other _____**RECEIPT OF ALL OTHER STATE
FUNDS: Check all that apply to
applicant organization**☐ Teen Pregnancy Prevention
Program (TPPP)☐ Community Response Initiative
(CRI)☐ After School Enrichment☐ Other _____**TOTAL FUNDS
REQUESTED:**

\$ _____

PARISH(ES) to BE SERVED :**PROPOSED NUMBER TO BE
SERVED:****CERTIFICATION**I (We) hereby certify that _____ on behalf of _____ is fully authorized, by
(Name of Individual) (Agency Submitting Application)law or by corporate resolution (attached) to submit the following Application for Funds, that the information contained herein is true and
accurate to the best of my (our) knowledge and belief; and that I (we) am (are) fully authorized to submit said application on behalf of
said agency.

Official Authorized to Submit Application

Title

Date

HAND DELIVERY PROPOSAL TO:Department of Social Services
Office of Family Support
Victoria M. Cooper
Director of Special Services
755 N. Third Street, Suite 323
Baton Rouge LA 70802**OR****MAIL PROPOSAL TO:**Department of Social Services
Office of Family Support
Victoria N. Cooper
Director of Special Services
P. O. Box 94065
Baton Rouge, LA 70804-9065

BOARD RESOLUTION FOR STATE CONTRACT PROVIDERS

State of Louisiana

Parish of _____

On the _____ day of _____, 20_____, at a meeting of the Board of
Directors of _____, with a quorum of the directors

Present, the following business was conducted:

It was duly moved and seconded that the following resolution be adopted:

BE IT RESOLVED that the Board of Directors of the above corporation does hereby authorize
_____ (name and title) and his/her successor in
office to negotiate terms and conditions that he/she may deem advisable, contract(s) with the
Louisiana Department of Social Services, and to bind this organization to execute said
documents on behalf of the corporation, and further we do hereby give him/her the power and
authority to do all things necessary to implement, maintain, and/or review said documents.

The above resolution was passed by a majority of those present and voting in accordance with
the by-laws and articles of incorporation.

I certify that the above and foregoing constitutes a true and correct copy of a part of the
minutes of the meeting of the Board of Directors of _____,
held on the _____ day of _____, 20_____.

Secretary

Date

**Department of Social Services
2006-2007 Budget Summary**

Name of Proposer _____

Street Address 1 _____

Street Address 2 _____

City, State, and Zip _____

Program: _____

For those proposers with multiple funding sources, a cost allocation plan should be included with this proposal. The plan should identify all funding sources and the percentage of cost that are associated with each funding source. This information is for the proposed services only, not for the entire organization. The cost allocation plan should be placed in the proposal behind the budget narrative. It should outline the shared costs of the project, what funding sources will be involved and the percentage of the funding sources involvement.

EXPENDITURE CATEGORY	ADMINISTRATIVE AMOUNT	DIRECT AMOUNT	TOTAL
SALARIES			
EMPLOYEE BENEFITS			
PURCHASED PROFESSIONAL AND TECHNICAL SERVICES			
PURCHASED PROPERTY SERVICES			
OTHER PURCHASED SERVICES			
SUPPLIES			
OTHER			
<u>GRAND TOTAL</u>			



TANF Funded Individual Development Account Clarification on Administrative and Allowable Costs

As a general rule, administrative costs for TANF-funded services should be no more than 10 percent of an entity's total allocation. **Agencies who receive TANF funding shall ensure that any contractors adhere to these specifications.** The examples below should help illustrate the types of cost allocations that would generally be considered to be administrative or non-administrative costs and identified costs that are would not be considered allowable even if otherwise related to service delivery.

The cost of salaries and related benefits should be calculated only for the percentage of time personnel works on TANF-funded activities. For example, a project director may be employed full time, but only 4 hours per week is allocated for TANF-funded activities. Only that portion of salary and benefits should be considered as an allowable cost, not the entire annual salary. Recipient agencies shall also ensure that any building costs related to program operation charge only the percentage of time that the facility is utilized for operations related to a TANF activity. For example, a program may receive funding from multiple sources, only the amount of time the building is used to provide TANF services should be considered a TANF expense. TANF shall not be used to subsidize building operations for other services.

The following are guidelines as to what is considered an administrative cost:

- ✓ General administration or coordination of program, including accounting and payroll functions;
- ✓ Salaries and indirect costs associated with performing administrative functions;
- ✓ Supplies, equipment, travel, postage, utilities and office space related to the administration of a program;
- ✓ Activities related to eligibility determinations;
- ✓ Preparation of program plan, budget and schedules; and
- ✓ Program monitoring and audits of service functions.

The following are guidelines as to what is considered a non-administrative cost:

- ✓ Direct cost of providing program services including client activities, assessment, case management, etc.;
- ✓ Salaries and indirect costs associates with performing services functions;
- ✓ Supplies, equipment, travel, postage, utilities and office space related to the performing of services functions;
- ✓ Evaluations of service functions
- ✓ Technology/management information systems (including data tracking for performance) not related to payroll, personnel or other administrative functions.

The following are not generally considered allowable costs under TANF, even if they are related to program operations:

- ✓ Purchase of vehicles;
- ✓ Renovation, construction or purchase (including payment of a mortgage) of a building used for program operation;
- ✓ Payment of bad debts, or interest payments as a result of credit agreements;

- ✓ Medical services;
- ✓ Payment of stipends to program participants without prior authorization from DSS;
- ✓ Payment of on-going basic needs (cash, food or housing) beyond four months;
- ✓ Services provided to elderly adults without minor children and single adults without children
- ✓ Payment of basic needs (housing, beds, etc.) for minors and adults in secure facilities;
- ✓ Payment of equipment costs that exceed or are disproportionate in relation to the cost of service delivery;
- ✓ Purchase of alcohol; and
- ✓ Services/materials determined to be inappropriate in their relation to program delivery.